

Art of the Marketing Plan:

Objectives, Innovation and Results

@DTCWS #DTCWS16

Moderator

Brian Baker

- VP Sales and Marketing, Chateau Montelena Winery
- Co-Chair Keynote/Steering Committee Member



Professional Experience

- Global director of marketing, Dollar Rent-a-Car
- VP Sales and Marketing, SFCVB
- VP CRM, Jackson Family Wines



SPEAKERS

Ed Russell (@edwardwrussell):

Professor, Syracuse University: SI Newhouse School of Public Communications

Lynn Bruni (@lynnbruni):

Vice President, Marketing Communications, San Francisco Travel Association

Dave Knox (@daveknox):

CMO, Rockfish International

Co-Founder, The Brandery

Managing Partner, Vine St Ventures

Advisor, Bullpen Capital



Ed Russell

Professional Experience:

- Syracuse University, SI Newhouse School of Public Communications
- J. Walter Thompson, Chicago
- Leo Burnett Worldwide, Chicago & Warsaw, Poland
- Saatchi & Saatchi Advertising, NY & Frankfurt, Germany



Works published:

- "The Fundamentals of Marketing" by Edward W. Russell, AVA Publishing UK/Switzerland. Publishing Fall,
 2009
- **"21st Century Communication: A Reference Handbook**;" Chapter 93 "The Business of Advertising" by Edward W. Sage Publications. June, 2009.

Honors + Awards:

- Spotlight of the Year National Residence Hall Honorary, 2003 2004
- Sigma Phi Phi Newhouse Professor of the Year, 2004-2005



Lynn Bruni

Professional Experience:

- San Francisco Travel Association
 - Vice President, Marketing Communications
 - Director, Consumer Marketing
- Universal McCann
 - Freelance Digital Media Consultant

Honors + Awards:

- Destiny Award Best Full Marketing Campaign
 - US Travel Association, Aug 2012
- Excellence in Tourism Marketing Award Best Integrated Marketing Campaign
 - Visit California, Feb 2012
- Travel Weekly Magellan Award Gold
 - Travel Weekly, Aug 2011
- HSMAI Adrian Award Gold Website Redesign
 - Hospitality Sales and Marketing Association International, Nov 2015
- Webby Awards Finalist Best Website Redesign, Associations
 - International Academy of Digital Arts & Sciences, Apr 2015





Dave Knox

Professional Experience:

- Rockfish
 - Chief Marketing Officer
- The Brandery
 - Co-Founder
- Proctor & Gamble
 - Brand Manager, Global Branded Entertainment
 - Brand Manager, Digital Business Strategy
 - Brand Manager, Wal-Mart Customer Team
 - Assistant Brand Manager

Honors + Awards:

- C-Suite Awards— Chief Marketing Officer of the Year
 - Cincinnati Business Courier, Aug 2015
- 40 Under 40
 - Ad Age, March 2015
- iMedia 25 Internet Marketing Leaders and Innovators
 - iMedia Connection, Nov 2010



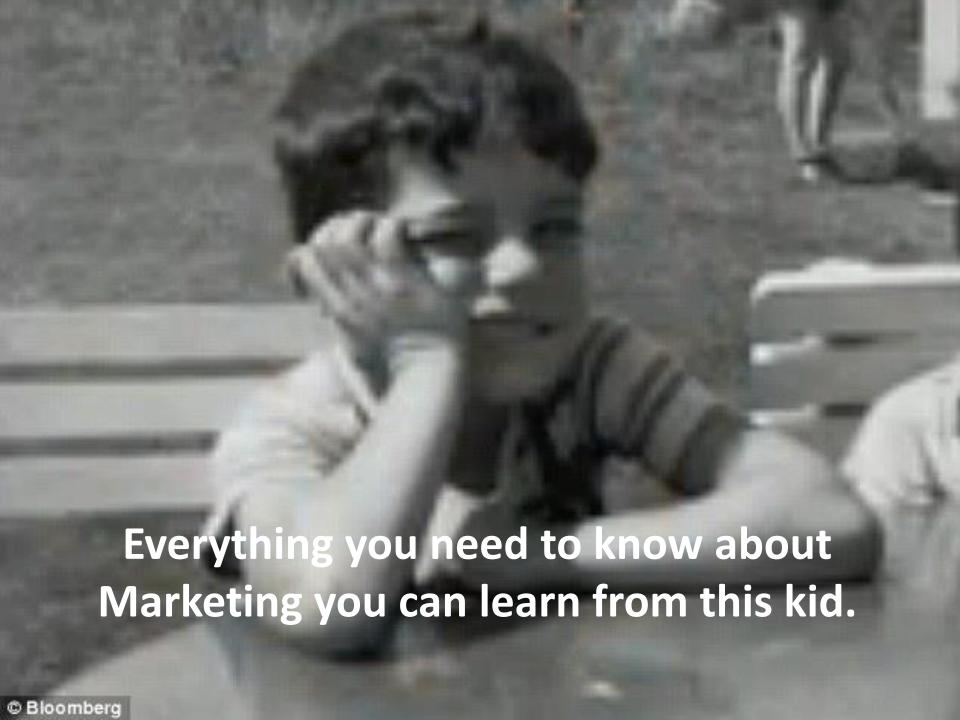




Ed Russell

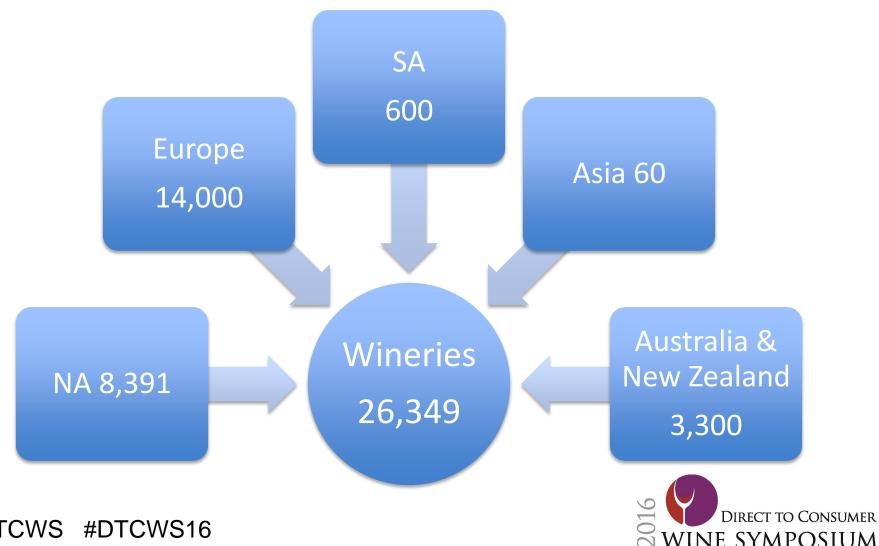
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How many wines do you customers have to choose between?





Marketing



• Ed Russell's definition:

The manipulation of Product, Price, Place and Promotion to maximize sales and or profitability.

- Product
- Price
- Place
- Promotion



What are the moving pieces





How do consumers decide?

Rational decision:

Awards,
recommendation,
experience, price point,

Irrational Decision: I like the label, restaurant experience,



Outline of a Marketing Plan

- I. Who we are?
- II. Our Competition
- III. Industry Analysis
- IV. Marketing Plan
- V. Financial Plan
- VI. Next Steps



NE SYMPOSIUM

I. Who Are We?

- A. Our Mission Statement
- B. Our Brands
- C. Awards & Accolades
- D. Sales Analysis geographic and seasonality

SWOT

Strengths, Weaknesses, Opportunities, Threats



II. Our Competition

- Other wines our consumers enjoy
 - Identify the 2-3 brands you most directly compete with.
- SWOT
 - Strengths, Weaknesses,
 Opportunities, Threats



Industry Analysis

- Is wine consumption growing/shrinking?
 - Where and when?
- What segments/brands are growing/shrinking?
 - Why?
- What impact will currency exchange rates likely have.



IV. 2016 Marketing Plan

- Product Strategy
 Packaging, Positioning, size, glass shape, size, cork, label design/message, wrapping of the bottle, 1st label, 2nd/3rd label, tasting room, etc.



IV. 2016 Marketing Plan

Place Strategy

Advantages and Disadvantages of each:

Tasting Rooms, wine clubs, direct mail, restaurants, wine shop, liquor stores.

Wine Trail vs. Destination Winery

Promotion Strategy

Creative Brief

What do you want to communicate?
To whom are we talking?
What do you want them to believe?
Simple Proposition
Reason to Believe

What Media?

Your label, magazine, newspaper, tourist brochures, radio, flyers, posters, email, social media, billboard, website, WOM, ad specialties (so consumers come into contact with the brand daily).

DIRECT TO CONSUMER

VE SYMPOSIUM

Awareness

Familiarity

Opinion/Imagery

Consideration

One Make / Model Intention

Shopping

Purchase

What is your consumer decision making funnel?

IV. 2016 Marketing Plan

Promotion Strategy (cont.)

- Turning tourists into Brand Enthusiasts
 - Purchase Funnel
- Creation of mini-wine trail
 - How can you work together to grow the entire industry?
- Sales Promotion tactics
 - Full case discounts, Monthly special sales (check Omaha Steaks)
- Wine Competitions



Financial Plan

Expected Sales

Marketing expenses as a percentage of sales

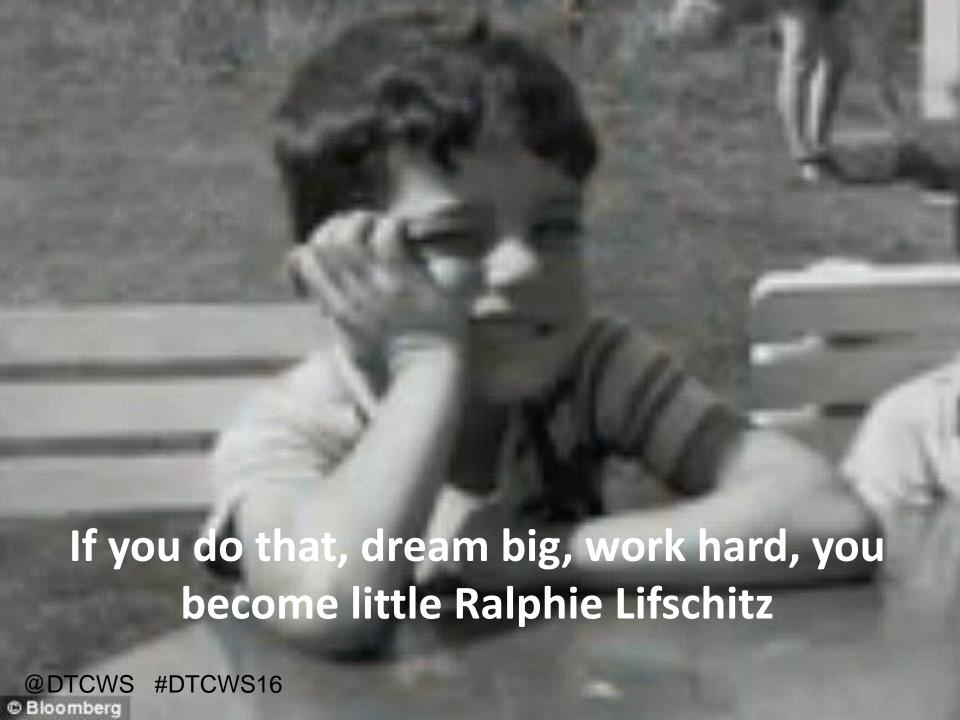
- Media Plan / Timing
- Profit Commitment



Next Steps

- Action steps by month
- Winery buy-in of all tactics
- Evaluate, Measure, Adjust
 - How & when the plan will be evaluated & adjusted to guarantee sales and profit commitment.







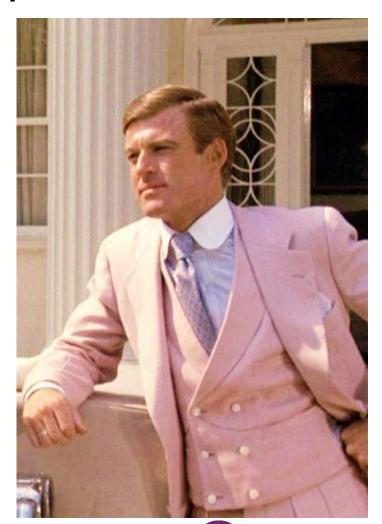
Ralph Lauren

- The Early Days
 - Ralph Lifschitz, 10/14/39 Bronx, NY to Belarusian immigrants.
 - He and a brother legally changed their last name to Lauren when Ralph was 16 years old.
 - Went to Baruch College in NYC for two years studying business before joining the Army.
 - After the Army, Lauren became a sales associate at Brooks Brothers.
 - In 1967 (age 28) he began designing his own like of ties under the name "Polo."
 - By 1970 he was designing women's suits cut like a man's suit. In 1972, he released a short sleeve cotton knit shirt with a Polo player on the chest in 24 colors.
 - Ralph Lauren Polo was on it's way.



The World of Ralph Lauren

- An aspirational style evoking the British gentry slightly modernized and Americanized.
- The Great Gatsby (1974)



What is Ralph Lauren?



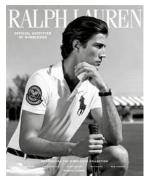


























What Ralph Did Right

Price

The \$675 cotton oxford at Flagship store and \$24,95 cotton Oxford at TJ Maxx. Also, Luxury labels, Chaps and Outlet stores

Place

Flagship store, 35 boutiques around the world, 150 RL Polo Outlet Stores in 41 states, boutiques in all the best department stores

Product

B+ Quality
Achievable Aspiration
Clearly understood Luxury
Marketing
Brand proliferation.

What Ralph Did Right

Promotion

Well defined look. Bought, owned and earned media,



So, what can you take away?

- Have a brand story as clear and well defined as the World of Ralph Lauren.
- Have a main brand but supplement with brands at multiple price points
- Distribute from top to bottom.
- Promote with a simple, aspirational message people want to be part of.





If there is any way I can help you, please don't hesitate to ask.

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Lynn Bruni VP, Marketing Communications San Francisco Travel Association @lynnbruni @DTCWS #DTCWS16



$$1 + 1 = 3$$

Leveraging Partnerships to Extend Your Marketing Reach

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AGENDA

- Why strategic marketing partnerships?
- Getting started
- Types of partnerships
- Measuring ROI
- Case study: Never the Same, Always San Francisco





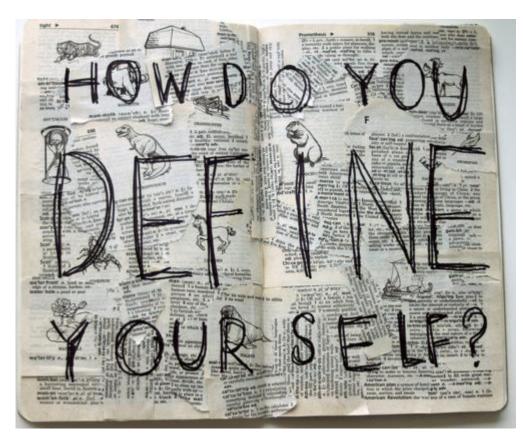
Why Strategic Marketing Partnerships?



- Will I cut cost while increasing revenue
 & market share?
- Can I tap into a new market with common customers?
- Is there a buying cycle of the customers that takes care of my need?
- Does my current customer see value in the partner's product or service?
- Do our companies share similar value systems among our employee base and customers?



Getting Started



Before you go out and seek partnerships, make sure that you have identified key characteristics that **define your brand**.



5 words that describe San Francisco

• Romantic Fine Arts
Museums of
San Francisco

- Offbeat → expl ratorium
- Innovative ———



- Fun ——— PIER 39
- Passionate ---- GayCities



Types of Cross Promotional Marketing Partnerships

- Co-op Marketing
- Co-branding
- Sponsorship
- Cause-related
- Product bundling





Measuring ROI

Make sure each partnership has a **revenue goal** or **value** attached to the program.

The ROI will determine if you want to continue the relationship in the future.

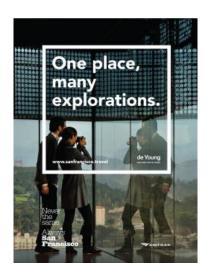


Case Study: Never the Same, Always San Francisco



- Co-op Marketing Campaign launched in Spring 2014
- Partners included de Young Museum, Asian Art Museum, Big Bus,
 PIER 39, American Express, Amtrak and Booking.com
- Goal was to increase visitor traffic to San Francisco, increase attendance to partner events and attractions and generate room nights throughout 2014.

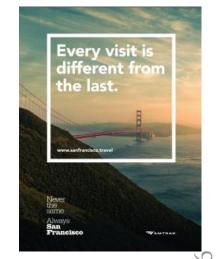
Co -Branded Creative and Content











Seattle Train Day Stunt event









Results

- Total Campaign Impressions: 181.3MM
- Provided brand exposure to four cultural institutions and three sponsors: de Young Museum, Pier 39, Big Bus, Asian Art Museum, Amtrak, American Express and Booking.com
- Hotel Bookings: 268 room nights booked (+75% yr/yr) via sanfrancisco.travel
- Direct program revenue and reduced media costs
- Program investment: \$350,000
- Program media value: \$1.1MM
- Estimated economic impact: \$1.7MM



Takeaways



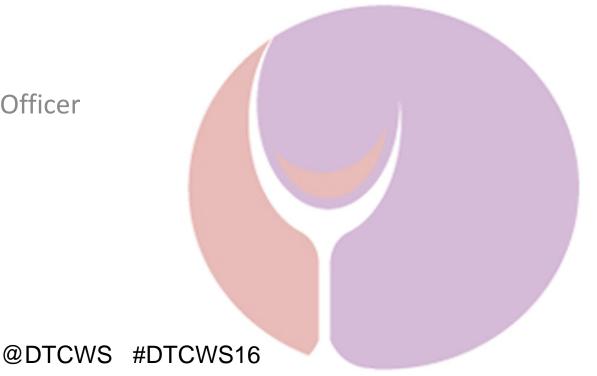
- Clearly define who you are and your goals, and find likeminded partners to extend reach and provide ROI
- KEEP AN OPEN MIND some of the best partnerships can come out of those you'd least expect
- Measure, measure, measure –
 be sure you know your ROI
- If it's not working, don't be afraid to walk away





Dave Knox

Chief Marketing Officer Rockfish @daveknox



"Simple" times have passed.





EVOLUTION OF ONLINE

OLD WAY (PRE-2008)

NEW WAY (2016)

SEARCH	Sites primarily discovered via keyword driven search	-	App SEO, Contextualization of results based on personal behavior	
NAVIGATION	Text based, modeled after in-store layout	-	Image-based, increasingly modeled after in-store layout.	
CONTENT	Static brand sites		Enhanced Retailer Product Detail pages	
EMAIL	Promotional driven, minimal personalization		Personalized messaging, Offers, Product recommendations	
CHECKOUT	Lengthy process with multiple steps	\rightarrow	Simplified, multiple buying options	
MOBILE	SMS		Responsive mobile sites, apps with in-store features	
MEDIA	Impressions based, broad reach, minimal targeting		Highly targeted reaching the intended shopper with the right message; in-ad purchase	
SOCIAL	Static post		Shoppable post, advanced targeting	
INFLUENCERS	Simplified Influencer selection		Identification of influencer based on algorithm	
REVIEWS	Review collection and display		Usability of reviews to support individual consumer needs	





#Amazon

Cart







With the rise of Omnichannel selling and mobile technology the lines have blurred between the online and brick-and-



Google wallet







shopkick

DIRECT TO CONSUMER

WINE SYMPOSIUM

	Discover	Plan	Act	Optimize
Overarching Strategy	 Discovery Sessions Landscape Assessment Digital Ecosystem Audit Shopper Insights Consumer Journey Map 	 OGSM Development/Strat egic Plan Tactical Roadmap/Annual Plan Product Innovation/New Product Launch Strategy 	 Implement Prioritized Tactics per Roadmap Activations through Joint Business Plan 	 Identify/Vet New Opportunities and Technologies Competitive Monitoring





Landscape Assessment



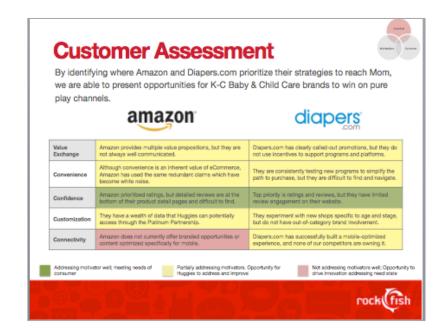
Outline target consumers' purchase motivators, brand e-commerce alignment to consumer needs and competitive review to identify white space opportunities.





Landscape Assessment









Digital Ecosystem Audit

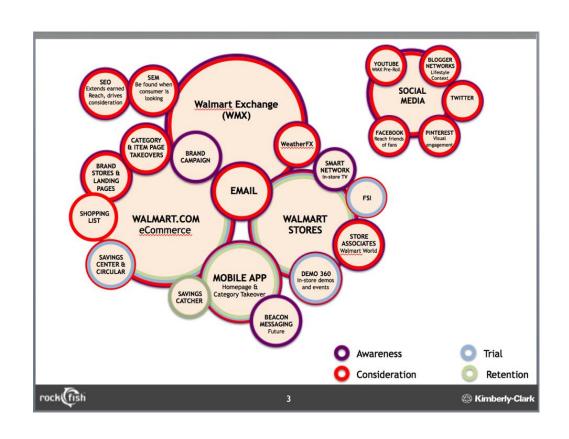


Evaluate the entire Digital Ecosystem for your brand and your partner retailers. Focus on website, mobile Application, Mobile website, social presence and usage, CRM/email programs, loyalty programs, digital couponing/promotions, and path to purchase.





Digital Ecosystem Audit







Digital Ecosystem Audit



WEBSITE

The hub of the Amazon Marketplace; Consumers can browse by category, coupons, driven by robust product recommendations



MOBILE APP

Amazon has multiple mobile apps to support different business units; real time image recognition aids consumers in price comparison shopping



SHOPPING LIST

Amazon Wishlist allow consumers to create and share items on their wish list.

AMZ Dash to support AMZ fresh list making



DIGITAL COUPONS

AMZ shoppers relay on VPC's through shopping experience, integration on Product Detail pages incent clips. Multiple VPC types available to Brands



DIGTIAL CIRCULAR

AMZ's leverage Email to promote offers to relevant consumers. They offer a coupon section, which groups VPCs by category



BRAND CONTENT

AMZ allows brands to create custom brand stores as well as integrate A+ content on product pages. Integrating video from brands into purchase path



ONLINE ORDERING

Amazon is considered the industry leader in eComm sales. They are ever evolving to improve conversion rates based on shopper behaviors



Strengths:

Leveraging data to anticipate shopper needs; Redefining distribution channels via alternative delivery options; Application of Analytics drive conversion

Weaknesses:

Shopper still want to physical experience with products per purchase. Low profit margins are a cause for concern



Amazon Prime is reportedly subscribed to by over 20 million households. Amazon also off Prime for Mom's and Students with special benefits within each group.



MEDIA NETWORK

AMZ media supports placements across the family of AMZ websites. Offer the ability to target consumers based on shopper behavior



YOUTUBE

AMZ leverages YouTube for education of their offering for their customers and promotion of new services. Very little is produced with for the end shopper.



PINTEREST

AMZ is not on Interest Although the product pages support smart pins. AMZ has an initiative called AMZ collections which looks to take aim at Pinterest



TWITTER

AMZ has multiple Twitter accounts that support their product offerings, primary focus on consumer service, deals, local offers.



FACEBOOK

AMZ has multiple FB pages to support different initiatives. Primary page focuses on a mix of offers and community outreach promotions



FMA

AMZ has a robust email capabilities and determines delivery based on past purchases. The offer a mix of paid placement and autogenerated communications to engage users





Consumer Journey Mapping

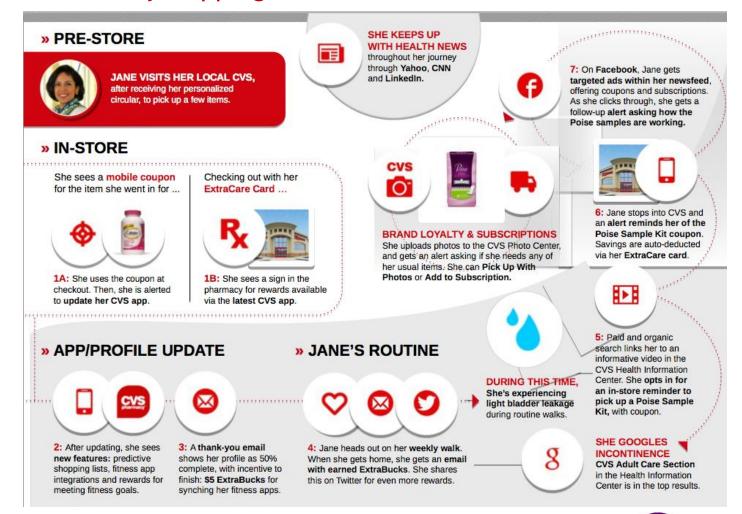


Consumer Journeys are created with a specific focus on understanding the holistic digital touch points that will drive an increase in sales.





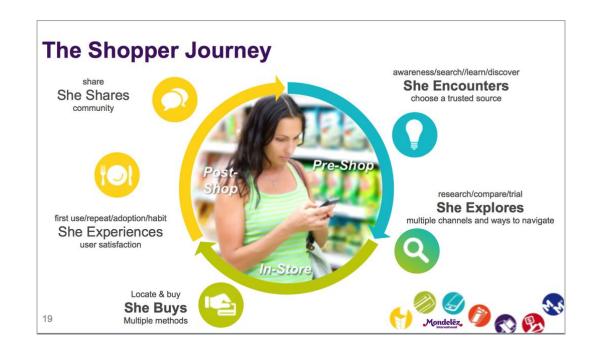
Consumer Journey Mapping







Consumer Journey Mapping







OGSM Development/Strategic Plan



Aligns and prioritizes overall objectives, goals, strategies and measurements acting as a guide for future tactical plans.





OGSM Development/Strategic Plan

2013 OGSM

What do we want to accomplish	How We Will Know We've Accomplished It (numbers)	What We Will Uniquely Do in the Marketplace To Accomplish It (words)	How We Will Track Progress Along The Way (numbers)
Objectives	Goals	Strategies	Metrics
Build Awareness Leverage relationship with Walmart and Paper Partners Inc. to optimize expansion of White Cloud brand into new categories Increase AWARENESS of the White Cloud brand and of exclusive Walmart availability	Establish "Pure Comfort" positioning and Brand Guidelines for Kruger and rest of WC products at Walmart. Increase brand awareness among Walmart Shoppers by x points Continue to support and grow social and email audience: Facebook fans by a %, Twitter followers by b%, YouTube views by c%, email subscribers by d%.	Leverage "Pure Comfort": positioning to distinguish White Cloud across Categories, and to drive a cohesive brand message. Extend master creative campaign to product specific messaging to help drive understanding of the good, better, best assortment across Categories. Distinguish WC brand via "Pure Comfort" positioning: Leverage Children's Miracle Network sponsorship. Bundle message and/ or offers across bath, tissue, towel, and other categories (if funded).	Other manufacturer participation levels in White Cloud promotional activities Brand awareness (aided, unaided) and Brand affinity scores (vs. Dec. 2010 baseline, 14%) Social media fans/ followers, impressions and engagement Email subscribers, open/ CTR rates
Drive Brand Engagement at Walmart Encourage Walmart Shoppers to seek out the White Cloud Brand Introduce new White Cloud Bath Tissue line Secure national distribution for Facial Tissue	Expand total Marketing reach by x% Successfully launch TAD Soft/ Strong during May modular reset, deliver \$x MM sales in first 3m Achieve FT distribution, deliver \$y MM sales in first 3m	Win at Walmart: Leverage Walmart communication vehicles, including Walmart.com and other targeted vehicles. Target all other media, paid or earned, to Walmart geo-markets and Shopper demographics. Drive consideration among Walmart Shoppers for WC Supreme Soft/ Supreme Strong and WC Facial Tissue. Ask Walmart Shoppers to switch away from "other brands" and try White Cloud. Request "the switch" with premium product/ luxury connection Create an "ask for White Cloud" campaign to create demand and engage brand ambassadors.	Degree of buyer support for Walm requested initiatives (TAB, Feature Co-op) Retail Link sales Media impressions, CPM Site visits and related metrics
Win POS Conversion Increase TRIAL of White Cloud bath, facial and paper products Grow LOYALTY within each Category to secure repeat shopping trips and create advocacy	White Cloud – BATH Grow sales a% Y/Y (incl. Moist Bath Tissue) White Cloud – FACIAL Grow sales b% Y/Y White Cloud – Kruger OTHER Grow Paper Towel sales c% Y/Y Grow GreenEarth sales d% Y/Y	Support Key Drive Times: BATH: Mar/ Apr Consumer Reports Anniversary, Aug Tab/ Feature, Dec Feature FACIAL: BTS, CCF, Allergy Kruger OTHER: Fall Cleaning, Earth Month Establish strong Call-to-Action through use of brand message and/ or coupons to drive purchase occasion, shopping trips, and market basket size/ assortment.	Purchase Intent Coupon prints and redemptions Retail Link sales







Tactical Roadmap



Tactical roadmaps provide details and direction to reach the specific business objectives, align on timing of specific tactics and set priorities to messaging.





Tactical Roadmap: Example Roadmap to eCommerce

PHASED APPROACH Recommended Roadmap: Abbott Nutrition E-Commerce Phase 1: Phase 2: Phase 4: Phase 3: **Quick Win** Execute & Set Create a plan **Tactics** a vision Measure · Determine what role · Create an eCommerce Create measurement · Create a virtual eCommerce team to drive eCommerce should play strategy that aligns with dashboard and embed key eCommerce tactical Division goals metrics into senior Secure executive initiatives and share executive dashboard · Establish objectives & KPIs endorsement learnings with brand and build them Embed consistent Appoint a senior level head Develop JBP with Amazon into goals. (Win, Grow, Play) measurement goals for of eCommerce for 2015 revenue and share into Build organization; define · Clarify what success looks · Integrate ecommerce into eCommerce, retail and roles and identify specialist digital media plans like and how to get there brand team goals needs eActivation of CRM Set, align and broadly Implement new process benefits communicate vision Create a process for developing, managing and Recruit for (where needed) Execute enhance content executing programs and implement new roles across all brands & responsibilities Improve brand navigation on Amazon Build metrics into brand team goals for 2015 In Progress Secure an external partner to help build foundational Key asks elements rock (fish Abbott 55 Nutrition



Tactical Plan

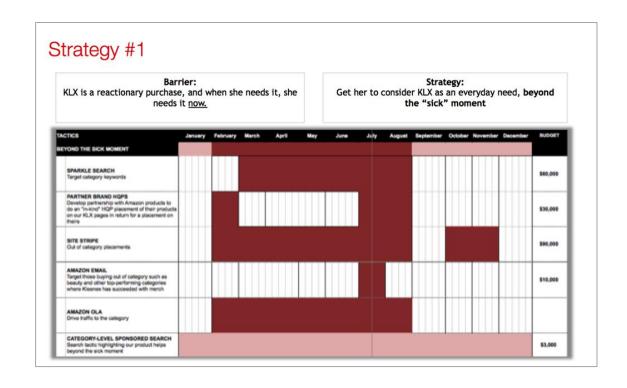


Similar to Roadmap but often focused on a singular barrier to purchase and marketing strategy to address.





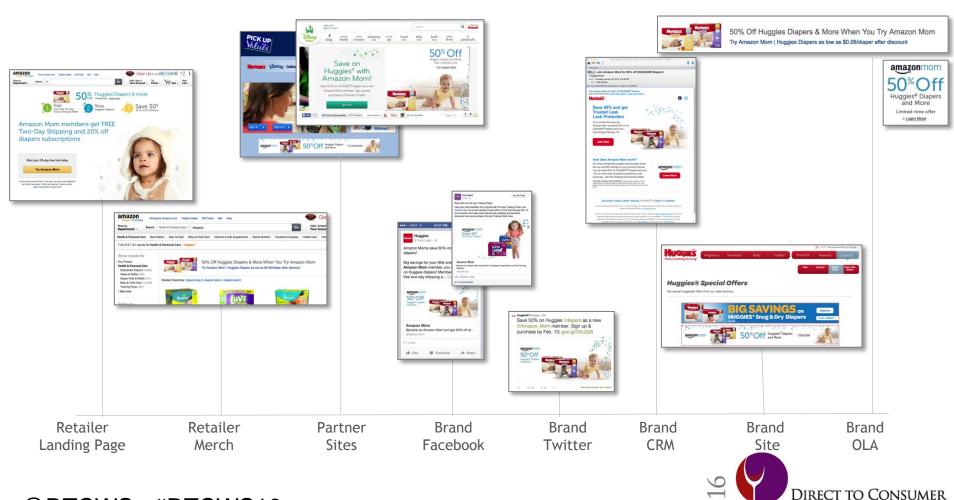
Tactical Plan: Example Tactical Plan to address trial barrier





Kimberly Clark

Kimberly Clark partnered with Amazon to offer an incentive to Acquire new Amazon Mom members. Program was activated across Amazon's ecosystem as well as Paid, Earned and Owned channels.



WINE SYMPOSIUM

5 Takeaways

- 1. Digital has changed how consumers "shop" and blurred the lines between eCommerce and brick & mortar stores.
- 1. All Marketing Plans start with an overarching strategy, broken down into:
 - Discover
 - Plan
 - Act
 - Optimize
- 2. Understanding the Shopper Journey can uncover unique moments for converting sales.
- 3. An OGSM creates a blueprint that aligns objectives, goals, strategies & measures.
- 4. Tactical Roadmaps help you to prioritize which digital marketing tactics best align with your consumers and business objectives.





THANK YOU

